



# 2014 Advertising Effectiveness ROI

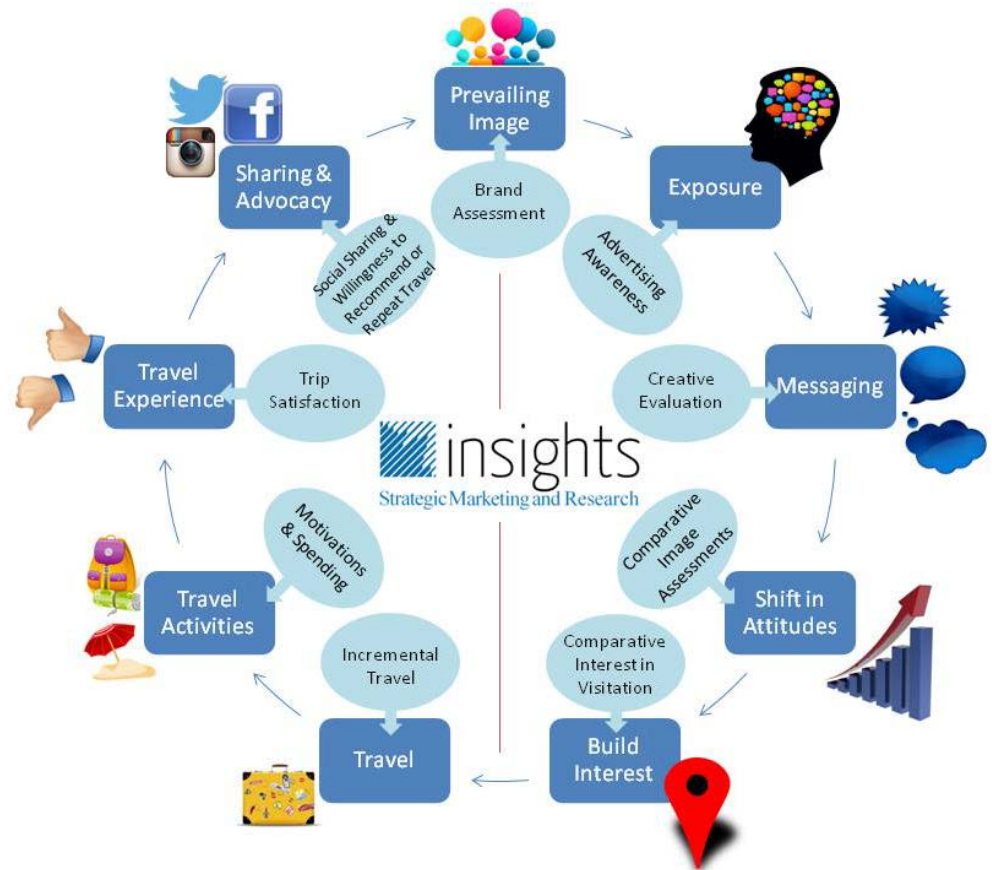
# Background



- The Wyoming Office of Tourism (WOT) works to position the state as a premier travel destination in the western United States. To that end, the organization invests in seasonal campaigns targeting leisure travelers. To be accountable for the dollars invested in its campaigns, WOT has contracted with Strategic Marketing & Research Insights, (SMARInsights) to conduct research that quantifies the impact of its advertising.
- This research is conducted in two waves. The first wave was an evaluation of the reach of the advertising, while this second wave measures the impact on travel and the resultant economic impact and return on investment (ROI).
- The goal of this research is not only to provide an overview of the results of the campaign, but also to forward recommendations for future refinements. The following report details a number of topics, including:
  - The number of incremental trips generated by the advertising;
  - The effectiveness of the marketing at reaching the target audience;
  - The impact of exposure to multiple elements of the campaign;
  - The resultant economic impact and return on investment of the spring/summer campaign; and
  - Recommendations for refining the marketing effort.

# Methodology

- SMARInsights has developed a research methodology based on the cycle of how consumers make their travel decisions. The graphic outlines each step of the process and the measure used to evaluate the effectiveness of a destination's marketing efforts.
- The awareness wave of research looks at the steps, clockwise, from Prevailing Image through Build Interest. This second wave evaluates Travel through Sharing and Advocacy.
- By looking at each part of the process, Wyoming Tourism can assess the campaign for future refinement



# Background & Methodology



- Because the advertising effectiveness methodology requires respondents to view the actual ads in order to gauge awareness, SMARI developed, programmed and housed an online survey. National sample vendors provided a link to the survey to potential respondents in WOT's target markets. The following are DMAs included in WOT's targeted markets:
  - ❑ **Adjacent:** Salt Lake City, UT; Denver, CO; Billings, MT; Idaho Falls, ID; Butte/Bozeman, MT; Boise, ID; Colorado City, CO; and Rapid City, SD
  - ❑ **Core Markets:** Kansas City, MO; Omaha, NE; Madison, WI; Minneapolis, MN; Wichita, KS; Milwaukee, WI; St. Louis, MO; Oklahoma City, OK; Tulsa, OK; and Portland, OR
  - ❑ **Chicago**
  - ❑ **National:** All other U.S. markets not included in those above
- An online survey was fielded in December 2014 and January 2015 and received 1,228 responses. However, in order for the process to yield more accurate results, the ROI and Visitor Profile processes were combined. Through this, more than 3,133 interviews were conducted to determine incremental travel.
- The following is a summary of the key findings from the research.

Market	ROI Interviews	Incremental Travel Interviews
Adjacent	362	418
Core	310	433
Chicago	253	317
National	303	1,965
<b>Total</b>	<b>1,228</b>	<b>3,133</b>

# Awareness Review





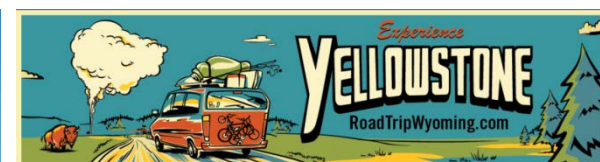
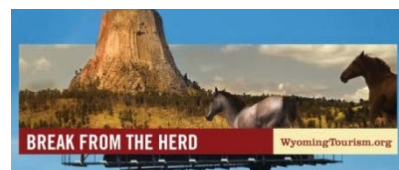
# Advertising Campaign



- In the Core markets (including Chicago), the Roam Free campaign continued with an extension of the creative that was initially placed in 2011. Here, three TV spots were in rotation supplemented by print, online and outdoor in select markets. The national audience had the opportunity to be exposed to these print and online elements.
- The Road Trip campaign continued in the Adjacent markets, but a new animated TV spot featured the same stylized graphics as the outdoor and online.
- Overall investment in the campaign was down slightly, most notably in the Adjacent markets.



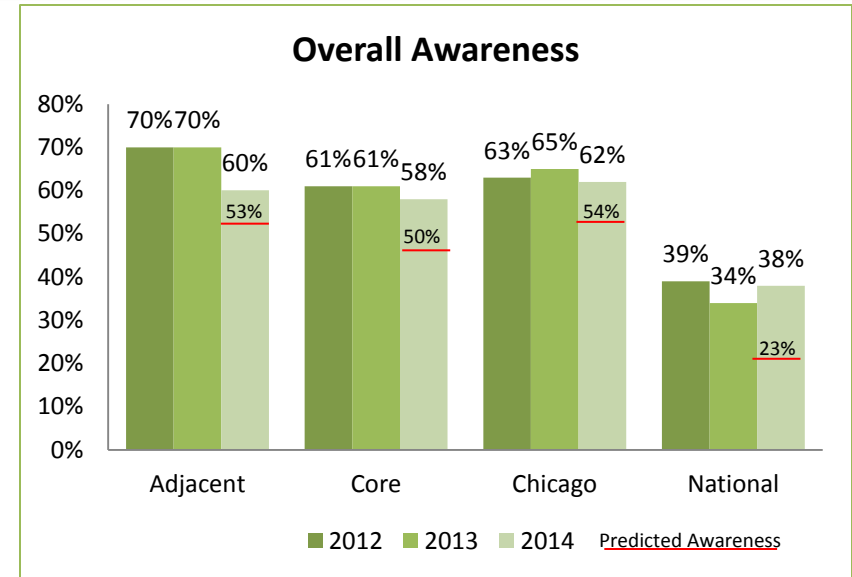
Market	2012	2013	2014
Adjacent	\$1,604,767	\$1,390,385	\$1,207,410
Core	\$1,808,292	\$2,038,853	\$2,005,950
Chicago	\$1,271,861	\$1,209,786	\$1,284,905
National	\$947,902	\$741,171	\$718,196
<b>Total</b>	<b>\$5,632,822</b>	<b>\$5,380,195</b>	<b>\$5,216,461</b>



# Advertising Awareness



- The current campaign in the Core and National markets has been in place for the past three years, with the same creative and similar levels of investment. Awareness here (including Chicago) has remained relatively stable for the past three years.
- Awareness did decline in the Adjacent markets with the introduction of new creative and less investment.
- SMARInsights has developed a model to anticipate awareness based on the number of households targeted and the level of paid investment. WOT's leisure marketing continues to beat the anticipated awareness across markets.
- SMARInsights has also developed a number of benchmarks based on hundreds of DMO campaigns evaluated. For efforts attempting to reach spot markets, such as the Adjacent and Core placements, the goal is a cost per aware household of \$0.50. While Core markets outside of Chicago are meeting this mark, the others are slightly higher. Given the national reach, the cost is considerably lower.



Cost per Aware HH	Adjacent	Core	Chicago	National	Total
Population	2,911,124	7,083,947	2,890,051	82,771,238	95,656,360
Awareness	60%	58%	62%	38%	41%
Aware HHs	1,749,129	4,108,689	1,791,832	31,453,070	39,102,720
Spending	\$1,207,410	\$2,005,950	\$1,284,905	\$718,196	\$5,216,461
Cost per aware HH	\$0.69	\$0.49	\$0.72	\$0.02	\$0.13

**SMARInsights  
spot market  
benchmark:  
\$0.50  
per aware  
household**

# Creative Review





# Creative Evaluation



- A campaign must generate awareness, but it also needs to communicate desired messages in order to drive travel. Through the evaluation of hundreds of destination marketing campaigns, SMARInsights has established a number of benchmarks related to advertising creative.
- After viewing all of the ads, respondents were asked to rate attributes using a 5-point scale where 5 = “strongly agree” and 1 = “strongly disagree.”
- There are two types of attributes related to advertising creative – those that communicate particular messages about the destination and those that encourage the consumer to take an action. The benchmarks developed are based on the communication attributes of DMO advertising. However, impact attributes have a more difficult time meeting this mark as they require action from a consumer, which is harder than communicating a desired message.

## Communication Ratings

<b>4.0</b>	<b>Considered Excellent.</b> Rating is in the top 10% of all communication ratings.
<b>3.75</b>	<b>Goal Rating.</b> Resides in the top 25% of all communication ratings.
<b>3.5</b>	<b>Average.</b> Rating is average compared to historic norms.
<b>3.0</b>	<b>Notable Weakness.</b> Rating is in the bottom 15% of all communication ratings.

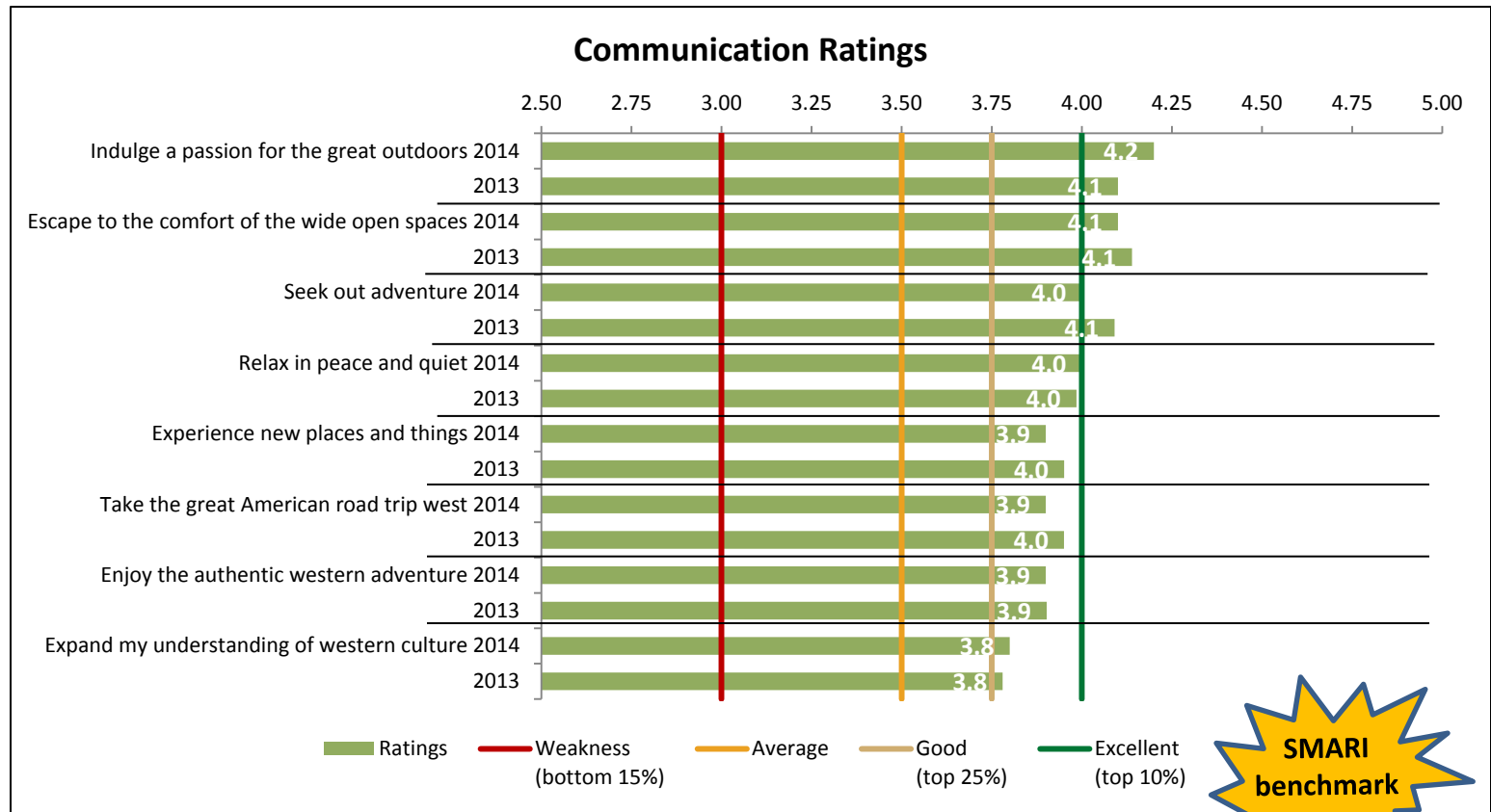
## Impact Ratings

<b>3.7</b>	<b>Considered Excellent.</b> Rating is in the top 10% of all impact ratings.
<b>3.5</b>	<b>Goal Rating.</b> Resides in the top 25% of all impact ratings.
<b>3.3</b>	<b>Average.</b> Rating is average compared to historic norms.
<b>3.0</b>	<b>Notable Weakness.</b> Rating is in the bottom 15% of all communication ratings.

# Creative Evaluation – Communication



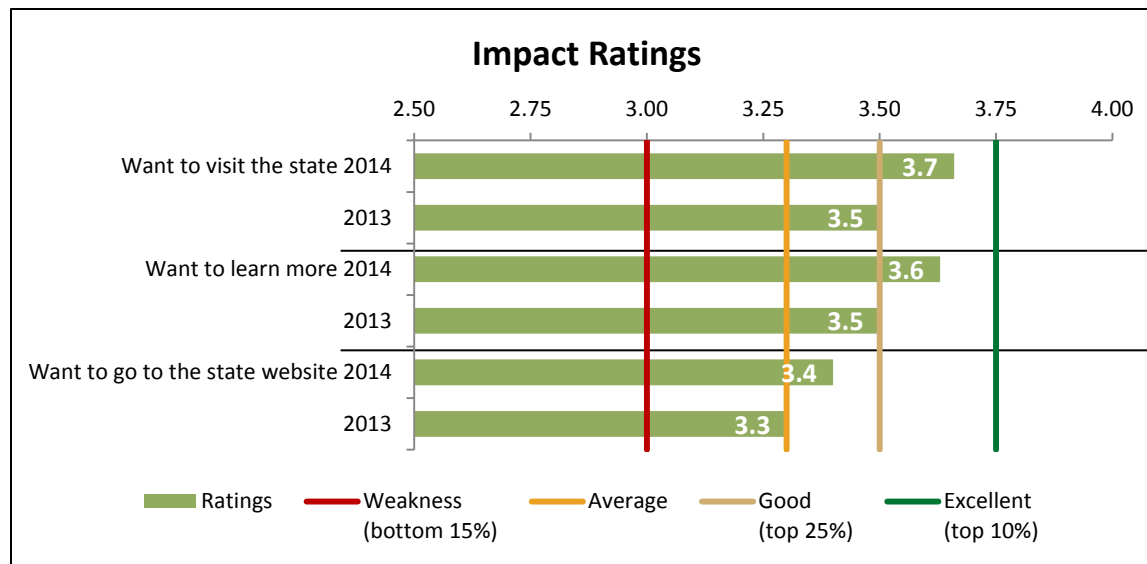
- The Wyoming Office of Tourism has consistently produced some of the best creative that SMARInsights evaluates. Not only are all of the communication ratings meeting the goal, but many of them also are pulling in “excellent” ratings, putting them in the top 10% of all DMO creative evaluated.



# Creative Evaluation – Impact



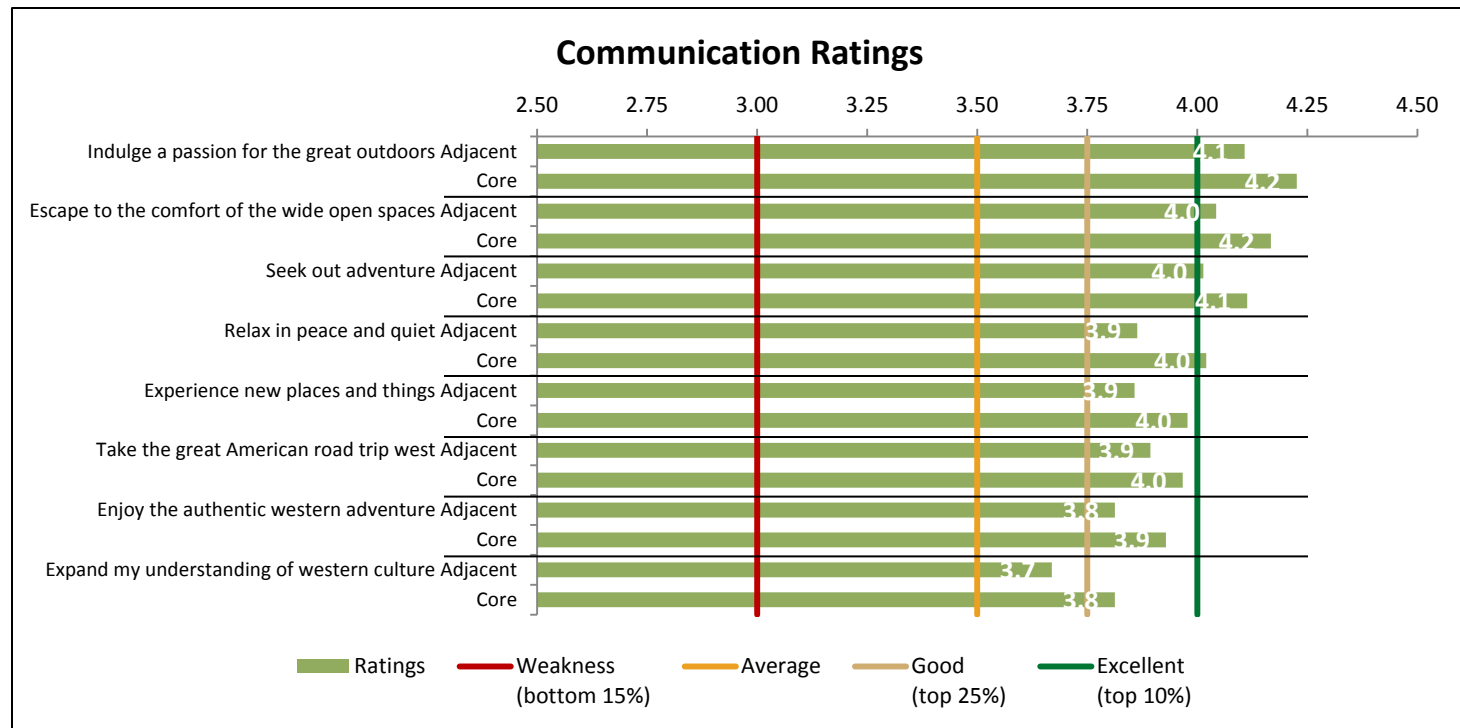
- Impact ratings are more difficult to generate. However, the advertising does a good job of making consumers want to learn more and, more importantly, visit.



# Creative Evaluation by Market – Communication



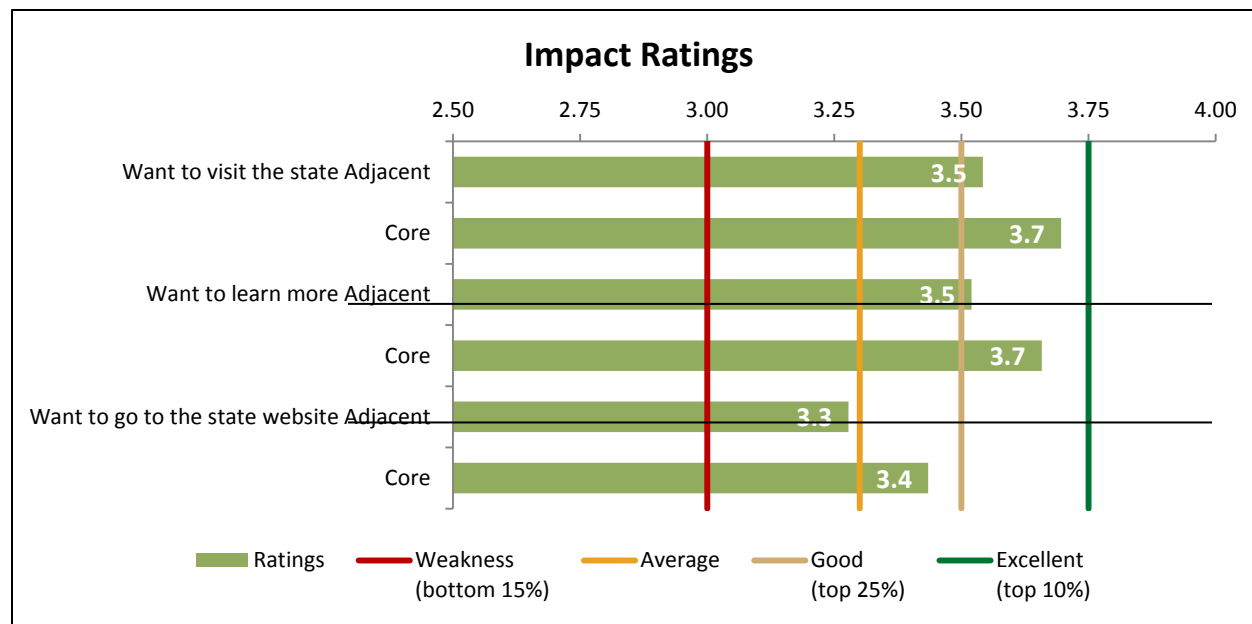
- Very different creative was placed in Core and Chicago as compared to the Adjacent markets. Though the ratings are strong for both across the board, the Core creative rates higher than Adjacent. The Roamin' Wyoming TV spot developed for the Adjacent markets, while very stylized, relies on animation. The Core market advertising that utilized iconic images consistently outperformed the animation placed in the Adjacent markets.



# Creative Evaluation by Market – Impact



- Even with the animation, the Adjacent markets are meeting or exceeding the goal rating for most communication and impact ratings. However, leisure travelers want to see the product so they can envision themselves and their families on a trip. SMARInsights has found it is difficult for consumers to do this with animation.





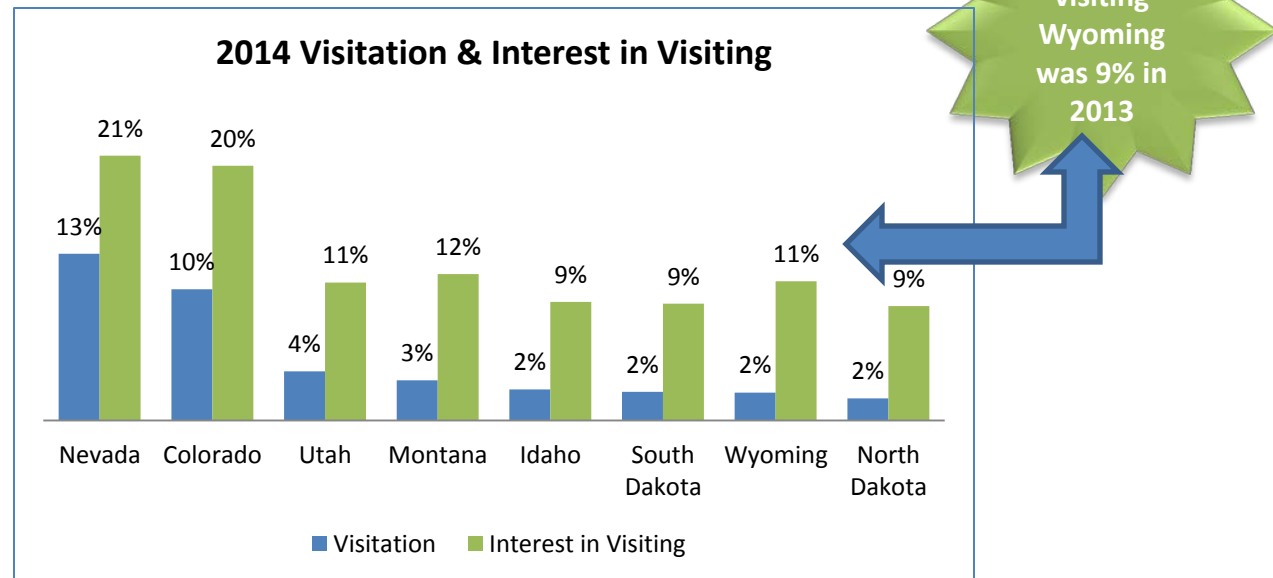
# Competitive Position



# Overall Travel



- Wyoming garners similar levels of overall travel compared to other Western destinations. However, consumers show more interest in the state than in others that are similarly positioned. Overall travel to the state grew to more than 10 million visitors for 2014 per the Visitor Profile supplied by SMARInsights. Consumers have lots of destinations in their consideration set when in a “dreaming” phase, and actual travel will not reach such levels. But interest in visiting Wyoming increased from 2013 when 9% were likely to visit in the coming year. This points to continued growth for 2015.



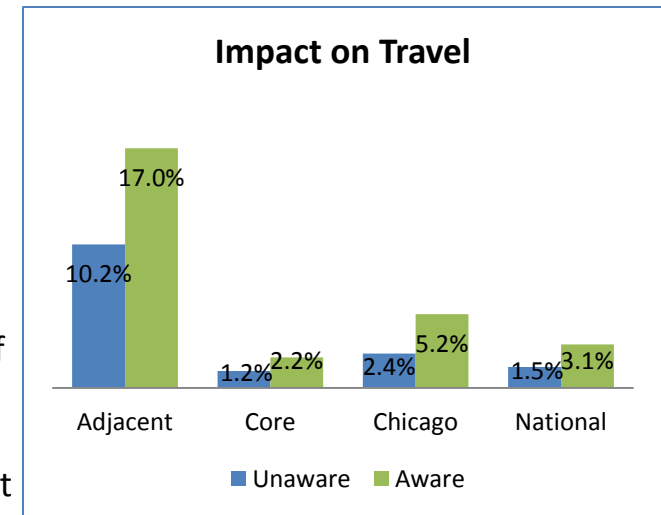
# Impact of the Advertising



# Impact of the Advertising



- The methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. In this evaluation, the level of travel among *unaware* households is considered the base and what the state would see without the marketing campaign. Accordingly, any travel above that base by *aware* households is what is considered influenced.
- The Adjacent markets have high rates of travel to Wyoming, even of those unaware of the advertising. This can make generating incremental travel difficult. But the 2014 advertising in these markets, the Road Trips campaign, was able to motivate a significant amount of incremental travel. There was concern that the animated creative did not perform as well as the Core creative. But given the influence on travel, this stylized animation resonated with the Adjacent audience and could continue to be placed without concern.
- After a number of years targeting Chicago, the market continues to generate a good level of incremental travel. As seen in the 2014 Visitor Profile, overall visitation to the state was up. And even a small increase in influence among the National audience results in a significant number of trips.
- Because the rates of unaware travel are similar for the Core markets (excluding Chicago) and the rest of the National audience, it is worthwhile to re-evaluate which markets are receiving targeted investment. SMARInsights has developed a Market Potential Model for a number of destinations that estimates the potential impact on travel for every DMA. This allows for assessment of ROI and can be a guide for the allocation of media dollars. Given the similar performance in the Core and National markets, this would be a useful tool for WOT.



# Incremental Travel



- Using the rate of awareness determined in the first wave of this research process and applying the resulting rates of incremental travel, there were more than 700,000 incremental trips to the state throughout 2014. Most of these trips originated in areas outside of the Core and Adjacent markets where WOT focuses the paid media. Again, the 2014 Visitor Profile notes a strong increase from overall travel among the national audience. These results solidify the importance of this audience outside of areas normally targeted and the need to evaluate those markets receiving targeted media.

## Incremental Travel

Cost per Aware HH	Adjacent	Core	Chicago	National	Total
Population	2,911,124	7,083,947	2,890,051	82,771,238	95,656,360
Awareness	60%	58%	62%	38%	41%
Aware HHs	1,749,129	4,108,689	1,791,832	31,453,070	39,102,720
Increment	6.8%	1.0%	2.8%	1.6%	1.8%
Incremental Trips	119,406	39,581	49,987	500,762	709,736



# Repeat Travel



- In addition to generating incremental trips, advertising can also encourage households to take more than one trip. With high rates of unaware travel, generating incremental trips in the Adjacent markets has been difficult for some time. However, WOT has continually been able to encourage visitors from these markets to make more than one trip through the use of advertising.
- In the Adjacent markets, those who were aware of the ads took more trips (1.3) than those who were unaware (1.2). In the Core markets, trips averaged 1.8 and 1.0, respectively.
- While there was little incremental travel from the Core markets (excluding Chicago), there was a strong rate of repeat travel by those who were aware of the advertising. Here, there were more influenced repeat trips than incremental trips (nearly 40,000).

## Repeat Trips Attributable to Ads

Repeat Trips	Adjacent	Core
Qualified HHs	2,911,124	7,083,947
Awareness	60%	58%
Aware HHs	1,749,129	4,108,689
Travel by Aware	17.0%	2.2%
Aware Traveling HH	297,343	88,959
Influenced repeat trips	0.1	0.8
Total repeat trips	28,857	69,539

# Influenced Travel



- With strong performance in the National markets, the 2014 campaign was able to influence nearly 150,000 more trips than the previous year. WOT heard from partners anecdotally that occupancy was up, events saw record visitation and tax receipts grew. The advertising was able to contribute to these successes, especially among those outside of the Core and Adjacent markets.

## Total Number of Influenced Trips

	2012	2013	2014
Incremental trips TV markets	85,422	398,300	208,974
Incremental trips national markets	456,719	129,635	500,762
Repeat trips	52,078	133,863	98,396
<b>Total influenced trips</b>	<b>594,218</b>	<b>661,798</b>	<b>808,132</b>

# Economic Impact



# Economic Impact



- The level of economic impact and the return on investment is unprecedented for Wyoming. With higher rates of overall travel and influence among the national audience, combined with increased trip spending, the total economic impact of the campaign was more than \$1 billion. The ROI of \$210 is well above the \$129 average SMARInsights sees for state DMOs.
- The ROI in the Adjacent markets continues to be strong, with a good level of influence even with less spending and new creative.
- The Core markets, including Chicago, have the lowest return. While still contributing more than \$200 million in economic impact, this again points to the need to perform a market analysis, determining the potential for individual markets.

	Adjacent	Core	Chicago	National	Total
Incremental Trips	119,406	39,581	49,987	500,762	709,736
Repeat Trips	28,857	69,539			98,396
Total Influenced Trips	148,262	109,120	49,987	500,762	808,132
<b>Economic Impact</b>	<b>\$200,895,537</b>	<b>\$147,857,829</b>	<b>\$67,732,849</b>	<b>\$678,533,169</b>	<b>\$1,095,019,383</b>
Media Spending	\$1,207,410	\$2,005,950	\$1,284,905	\$718,196	\$5,216,461
<b>ROI</b>	<b>\$166</b>	<b>\$74</b>	<b>\$53</b>	<b>\$945</b>	<b>\$210</b>

# Adjacent Impact



- While the incremental travel in the Adjacent markets was strong, and generated the best ROI of the markets receiving targeted media, there was a slight decline from the previous year. This is primarily attributable to lower awareness that resulted from the introduction of new creative. And while there were some initial concerns about the animated creative's ability to motivate travel, it performed well. There should be no hesitation with continuing to place the Road Trip creative with its distinctive look.

Adjacent Markets	2012	2013	2014
Aware HH	1,824,012	2,017,703	1,749,129
Total impacted trips	59,081	222,636	148,262
<b>Economic impact</b>	<b>\$68,190,662</b>	<b>\$243,118,941</b>	<b>\$200,895,537</b>
Media Spending	\$1,604,767	\$1,390,385	\$1,207,410
<b>ROI</b>	<b>\$42</b>	<b>\$175</b>	<b>\$166</b>



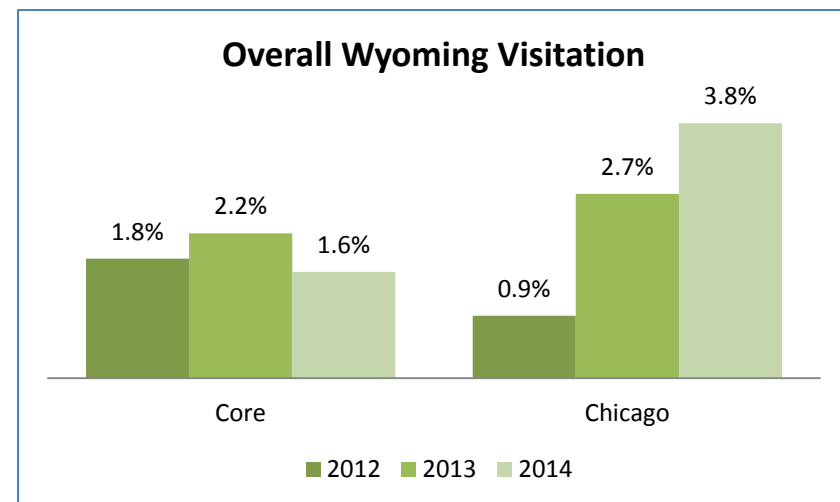
# Core & Chicago Impact



- While Chicago is considered a Core market, it receives a significant level of investment on its own, thus it is evaluated separately. Influence in these markets have fluctuated in recent years, with strong performance in 2013.
- However, the investment in the Core markets outside of the Chicago has not moved overall travel. Again, these markets behave similarly to the national audience, with overall travel hovering around 2%.
- In Chicago, continued targeted placements have resulted in gradual increases in travel to the state. While incremental travel for the market is good, the ROI lags because of the level of investment. In the awareness wave report, there were concerns with the drop in awareness for print and outdoor in this market. In light of the higher than goal cost per aware household, it is possible WOT could garner similar levels of awareness and influenced travel by backing off the dollars invested here, particularly in print and outdoor.

Core	2012	2013	2014
Aware HH	3,674,257	4,266,509	4,108,689
Total impacted trips	31,317	216,075	109,120
<b>Economic impact</b>	<b>\$36,139,818</b>	<b>\$235,953,861</b>	<b>\$147,857,829</b>
Media Spending	\$1,808,292	\$2,038,853	\$2,005,950
<b>ROI</b>	<b>\$20</b>	<b>\$116</b>	<b>\$74</b>

Chicago	2012	2013	2014
Aware HH	1,723,994	1,854,754	1,791,832
Total impacted trips	47,102	93,452	49,987
<b>Economic impact</b>	<b>\$54,355,708</b>	<b>\$102,049,827</b>	<b>\$67,732,849</b>
Media Spending	\$1,271,861	\$1,209,786	\$1,284,905
<b>ROI</b>	<b>\$43</b>	<b>\$84</b>	<b>\$53</b>



# National Economic Impact



- Interestingly, the years the Core markets had less influence were the years the marketing influenced the rest of the national audience. While the WOT budget does not warrant a move to a national campaign, it could allocate additional dollars to increasing awareness here. By performing a market analysis, it could be determined that some markets would respond better than others to targeted media placements and leave additional dollars available for national digital efforts.

National	2012	2013	2014
Aware HH	31,050,326	27,687,743	31,453,070
Total impacted trips	456,719	129,635	500,762
<b>Economic impact</b>	<b>\$527,144,173</b>	<b>\$141,560,937</b>	<b>\$678,533,169</b>
Media Spending	\$947,902	\$741,171	\$718,196
<b>ROI</b>	<b>\$556</b>	<b>\$191</b>	<b>\$945</b>

# Total Economic Impact



- The tremendous increase in the number of influenced trips, especially from the National audience, drives the more than \$1 billion in economic impact from the 2014 campaign. Given the level of investment of state resources, this resulted in nearly \$45 million in taxes back to state coffers for an ROI of more than \$8.50 for every \$1 in paid media.

Total Economic Impact	2012	2013	2014
Incremental trips	542,140	527,935	709,736
Repeat trips	52,078	133,863	98,396
Total influenced trips	594,218	661,798	808,132
<b>Economic impact</b>	<b>\$685,845,643</b>	<b>\$722,683,566</b>	<b>\$1,095,019,383</b>
Expenditures	\$5,542,918	\$5,380,195	\$5,216,461
<b>ROI</b>	<b>\$124</b>	<b>\$134</b>	<b>\$210</b>
Taxes generated	\$28,119,671	\$29,630,026	\$44,895,794
Tax ROI	\$5.07	\$5.51	\$8.61

# Insights



- With considerable increases in overall travel to the state, the marketing made positive gains for 2014, including:
  - Visitor spending of more than \$1 billion, up from \$725 million in 2013;
  - More than 800,000 influenced trips, many of them from a national audience that contributed to the overall increase in visitation to the state;
  - A return on investment of \$210 for every \$1 spent in paid media, up from \$134.
- The Adjacent markets saw a drop in awareness with the introduction of new creative and slightly less investment. The creative ratings pointed to concerns in the execution of the Road Trips campaign, most notably the use of animation for an industry reliant on imagery. However, with strong incremental travel from these markets, the creative is not cause for concern. Though the ratings may not have been as strong as other brand marketing, they are still in the top 25% of all DMO creative SMARInsights evaluates, and consumers here responded favorably to the nostalgic look and feel.
- Continued targeted investment in Chicago over the course of the past five years has resulted in gains in overall travel from the market. This is likely a good market for continued investment, but WOT should evaluate the resources being invested and in what way. The cost per aware household is a bit higher than the target, indicating the possibility of overspending and that the same level of awareness could be achieved with less investment. Specifically, WOT should evaluate the allocation to print and outdoor in the market. The outdoor has been in the market for a number of years and it is possible consumers do not find the imagery as majestic as when it was introduced. Other SMARInsights' clients who have had success with outdoor in recent years have found a way to tie the placements to public relations and social media components of their efforts.



- The performance of Core markets outside of Chicago calls for a re-examination of the investment here. WOT has been investing in this set of markets consistently for many years, yet there has been little to no movement in the overall rate of travel. And even then, travel is similar to that of the rest of the country considered to be the National audience. SMARInsights is recommending a Market Potential evaluation that can provide estimates on the number of trips WOT can expect from every DMA and what level of investment would be required. From there, the organization can make decisions about how best to allocate the dollars that have been funding efforts here.
- With an uptick in both the rate of travel among the National audience and interest in visiting in 2015, WOT should consider additional investment here. With minimal print and online presence, the campaign was able to generate a considerable portion of the overall influence here. Given the sheer size of the population, a small increment can make a big impact. While a National TV presence is likely not feasible, exploring digital options could both increase awareness and impact.

# Appendix – Questionnaire



# Questionnaire



## Wyoming Office of Tourism Advertising Effectiveness ROI and Visitor Profile Nov. 12, 2014

We need to set it up for Wyoming, donut and national so that we can get separate incidence levels for each and also know when we start terminating non-visitors.

S1. What is your ZIP code? \_\_\_\_\_

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

- 1 .....Me
- 2 .....Myself and my spouse/partner
- 3 .....My spouse/partner → TERMINATE AT END OF SCREENING QUESTIONS

S3. How many vacation or leisure trips have you taken in the past year? A leisure trip would be any non-business trip involving at least one night's stay at a location at least 50 miles from your home.

- ☐ None → TERMINATE AT END OF SCREENING QUESTIONS
- ☐ \_\_\_\_\_

S4. (ASK UNTIL AD EFFECTIVENESS QUOTA IS COMPLETE) Please take a moment to view the following video clip and answer the question. (INSERT TEST AD AND SET UP OPTIONS FOR HIGH SPEED CONNECTION/DIAL UP CONNECTION)

Were you able to view the video?

- ☐ Yes
- ☐ NO → TERMINATE AT END OF SCREENING QUESTIONS

S5. What is your age?

1. Under 18 → TERMINATE
2. 18-24
3. 25-34
4. 35-44
5. 45-54
6. 55-64
7. 65 or older

INSERT TV AND ONLINE SCREENER

END OF SCREENING QUESTIONS

1. Have you visited any of the following states since the beginning of 2014, for a leisure trip that included an overnight stay? How many overnight leisure trips did you take to each state during 2014?

	States visited in 2014 (check all that apply)	Number of overnight visits
Colorado		
Idaho		
Kansas		
Montana		
Nevada		
New Mexico		
Oklahoma		

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Oregon		
South Dakota		
Texas		
Utah		
Washington		
Wyoming		
North Dakota		
None of these		

FOR VISITOR PROFILE: IF DID NOT VISIT WYOMING, SKIP TO ADS

2. Did you recommend any of these places as trip destinations to your friends, relatives or co-workers? Which ones? (SHOW LIST OF PLACES VISITED FROM Q1)
3. How likely are you to take a leisure trip to any of the following states in the next year?

	Not likely	Somewhat likely	Very likely
Colorado			
Idaho			
Kansas			
Montana			
Nevada			
New Mexico			
Oklahoma			
Oregon			
South Dakota			
Texas			
Utah			
Washington			
Wyoming			
North Dakota			

4. Please tell us a little more about your 2014 overnight Wyoming trip(s). If you are listing multiple trips, the most we will ask you about is 6. Thinking about ...

	Month of trip (DROP DOWN WITH MONTHS – JAN THRU DEC)	How many nights did you stay? (let respondent enter number)	Main purpose was to visit friends or family
Wyoming trip(s) (INSERT TRIP #)			

5. Besides this year, had you visited Wyoming for an overnight leisure trip in the previous five years?

1. Yes
0. No – SKIP TO Q6

5A. In the past 5 years, how many overnight leisure trips have you taken to Wyoming? \_\_\_\_\_

[RANDOMLY SELECT WYOMING TRIP SELECTING ONE WHOSE PRIMARY MOTIVATION WAS NOT TO VISIT FRIENDS AND FAMILY FIRST – IF NONE, THEN RANDOMLY SELECT ANY. PLEASE PULL IN MONTH AND LENGTH OF TRIP TO INDICATE WHAT TRIP – EG. 5 NIGHT TRIP IN JANUARY.]

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# Questionnaire



6. Which of the following best describes your visit to Wyoming on your (INSERT LENGTH AND MONTH FROM WYOMING Q4) trip to Wyoming?
1. Wyoming was my main destination.
  2. I was ultimately headed somewhere else, but included a visit to Wyoming.
  3. Wyoming was one of several places I decided to visit on this trip.
7. What other states did you visit on this trip?  
[INCLUDE STATE LIST WITH CHECK BOXES INCLUDE  
NO OTHER STATES VISITED AT END OF LIST]
8. How far in advance did you begin planning that [INSERT LENGTH AND MONTH FROM Q4] trip to Wyoming?
1. Less than 1 month
  2. At least 1 month, but less than 2 months
  3. At least 2 months, but less than 3 months
  4. At least 3 months, but less than 6 months
  5. 6 months or more
9. Prior to your (INSERT LENGTH AND MONTH FROM Q4) visit to Wyoming, which of the following sources did you use to gather information for planning your trip?
1. Called 800 number to request info
  2. Talked to friends and family
  3. Used Internet
  4. Contacted individual attraction or event to request information
  5. Contacted individual chamber of commerce to request information
  6. Used online travel agency such as Expedia or Orbitz
  7. Used online review sites such as TripAdvisor or Yelp
  8. Used social media such as Facebook or Pinterest
  9. Other (Please specify \_\_\_\_\_)
  10. None
10. What method of transportation did you use to travel to Wyoming on your (INSERT LENGTH AND MONTH FROM WYOMING Q3) trip?
1. Drove via car, van, truck or SUV
  2. Drove via RV
  3. Flew/airplane (Specify airport) \_\_\_\_\_
  4. Bus or motor coach trip
  5. Motorcycle
  6. Other (Please specify) \_\_\_\_\_
12. Including you, how many people were in your travel party? \_\_\_\_\_

ASK IF Q12 > 1

13. With whom did you travel...?
- ☐ Spouse / significant other
  - ☐ Child(ren)/grandchild(ren): age 0-12
  - ☐ Child(ren)/grandchild(ren): age 13+
  - ☐ Other family
  - ☐ Friends/acquaintances

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14. What forms of lodging did you use during your trip? (Mark all that apply.)
1. Hotel, motel, inn, lodge, bed & breakfast or resort
  2. Dude ranch
  3. RV park/campground
  4. Homesharing/vacation rental, i.e., booked through Airbnb, Homeaway, etc.
  5. Condominium or timeshare
  6. With friends or family
  7. Other (Specify) \_\_\_\_\_
15. Which of the following activities did you participate in during your trip to Wyoming? (Mark all that apply.)
- |                                   |   |  |
|-----------------------------------|---|--|
| Hiking or backpacking             | Visiting Native American sites            |  |
| Visiting a state or national park | Attending a pow wow                       |  |
| Bicycling or mountain biking      | Attending a festival or fair              |  |
| Mountain climbing                 | Attending performing arts (music/theater) |  |
| Rock climbing                     | Visiting historical sites                 |  |
| Horseback riding                  | Attending a rodeo                         |  |
| Hunting                           | Visit archeological site                  |  |
| Camping                           | Wildlife watching                         |  |
| Snow skiing or snowboarding       | Bird watching                             |  |
| Snowmobiling                      | Scenic drive                              |  |
| Canoeing or kayaking              | Sightseeing tour                          |  |
| River rafting                     | Golfing                                   |  |
| Boating                           | Visiting a dude ranch                     |  |
| Fishing                           | Visiting hot springs                      |  |
| Visiting museums                  | Shopping                                  |  |
|                                   | Gambling                                  |  |
|                                   | Other (Specify) _____                     |  |

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

16. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to Wyoming in [INSERT MONTH]. You may choose up to 3.

INSERT WYOMING REGIONS MAP USED IN WYOMING VISITOR PROFILE QR

17. Which of the following regions did you visit during your trip?
1. Central
  2. Northeast
  3. Northwest
  4. Southwest
  5. Southeast

18. Which of the following places or attractions did you visit?

Central Region	Northwest Region (Cont.)
Wyoming Pioneer Museum	Wapiti Valley
Casper	Lander
Fort Laramie National Historic Site	Wyoming Dinosaur Center
Register Cliff	National Museum of Wildlife Art
Independence Rock	Sinclair Canyon State Park
Terrington	South Pass City State Historic Site
National Historic Trails Interpretive Center	Thermopolis
Douglas	Other (Specify) _____
Fort Caspar Historic Site	

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# Questionnaire



Gottseig Trail Ruts	Southeast Region
Other (Specify)	University of Wyoming
	Cheyenne
	Laramie
<b>Northeast Region</b>	
Newcastle	Cheyenne Frontier Days
Devils Tower National Monument	Old West Museum
Sheridan	Rawlins
Gillette	Snowy Range Mountains
Fort Phil Kearney Historic Site	Saratoga
Medicine Wheel Passage Scenic Byway	WY State Capitol
Big Horn Scenic Byway	Wyoming Territorial Prison
Buffalo	Encampment, Medicine Bow National Forest
Other (Specify)	Other (Specify)
<b>Northwest Region</b>	<b>Southwest Region</b>
Yellowstone National Park	Museum of the Mountain Man
Grand Teton National Park	Evanson
Jackson Hole	Green River Lakes
Cody	Rock Springs/Green River
Big Horn Mountains	Flaming Gorge National Recreation Area
Buffalo Bill Center of the West	Prichard
Snake River	Kennecott
Big Horn Canyon National Recreation Area	Fort Bridger State Historic Site
Wind River Indian Reservation	Fossil Butte National Monument
Snake River Canyon	Afton
Hot Springs State Park	Sun Valley
Evanson	Bridger-Teton National Forest
Cody Night Rodeo	Other (Specify)
National Bighorn Sheep Center	

19. Thinking about your overall travel experience in Wyoming, would you say it was...?

1. Poor
2. Fair
3. Good
4. Very Good
5. Excellent

20. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in Wyoming on your trip in [INSERT MONTH]. Please estimate how much your travel party spent in total on...

**Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"**

Lodging/accommodations \_\_\_\_\_  
 Meals/food/groceries \_\_\_\_\_  
 Entertainment/attractions \_\_\_\_\_  
 Shopping \_\_\_\_\_  
 Entertainment such as shows, theater or concerts \_\_\_\_\_  
 Transportation such as gasoline, auto rental or flight costs \_\_\_\_\_  
 Other \_\_\_\_\_

Please take a moment to look at the following ads and answer a couple of questions.

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**ROI NATIONAL AND VISITOR PROFILE WILL SEE PRINT AND ONLINE ONLY  
 ROI CORE AND ADJACENT ADS FOR EACH MEDIUM ARE SPECIFIED IF THEY  
 ARE DIFFERENT**

## PRINT

DevilsTowerLR.jpg  
 TetonLR.jpg  
 WildlifeLR.jpg  
 YellowstoneLR.jpg

FOR ROI, ASK INDIVIDUALLY  
 FOR VISITOR PROFILE, GROUP  
 FOR EACH PRINT AD ASK:

21. ☐ I have seen this or a similar ad before  
☐ I have not seen this or a similar ad before

## ONLINE

CORE and NATIONAL  
 wyospringSum14\_300x250\_exp-bnr\_02.swf  
 wyospringSum14\_300x250\_PNL\_03.swf

## ADJACENT

wyo\_cyon\_300x250\_exp-BNR\_07.swf

FOR EACH ONLINE AD ASK:

22. ☐ I have seen this or a similar ad before  
☐ I have not seen this or a similar ad before

FOR ROI, SKIP NATIONAL TO Q27

FOR VISITOR PROFILE, IF NON VISITOR, TERMINATE  
 IF VISITOR, SKIP TO Q28

## PRINT INSERT – SHOW ALL ON ONE PAGE

AdventureAtlas\_2014\_MASTER 1.jpg  
 AdventureAtlas\_2014\_MASTER 2.jpg  
 AdventureAtlas\_2014\_MASTER 3.jpg

23. ☐ I have seen this newspaper insert before  
☐ I have not seen this newspaper insert before

## TV

### CORE AND CHICAGO

Imaginary Flight <http://youtu.be/am0U7FL2DKo>  
 Anthem [http://youtu.be/XWbN8a3W\\_M](http://youtu.be/XWbN8a3W_M)  
 Bonfire <http://youtu.be/5-T0P721AM>

ADJACENT – SEPT INTERVIEWING ONLY  
<http://youtu.be/Ps5N2IP4914>

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# Questionnaire



FOR EACH TV ASK

24. How many times have you seen this television ad?

- ☐ Never
- ☐ Once
- ☐ A few times

OUTDOOR – NOTE FOR ANALYSIS: CHICAGO, KANSAS CITY, MADISON, MINNEAPOLIS, OMAHA, PORTLAND, ST. LOUIS ONLY

CORE AND CHICAGO

wotlong may you roam buffalo.jpg  
wot5 break from herd DTower.jpg

ADJACENT

Devils Tower.jpg  
Rodeo.jpg  
Teton.jpg  
Yellowstone.jpg

FOR EACH BILLBOARD AD ASK:

26. ☐ I have seen one of these or a similar ad before  
☐ I have not seen one of these or a similar ad before

WEBSITE

Insert Screen shot of Website – wyomingtourism.org  
E:\Ads - Master\Wyoming\Wyoming 2012\Website Facebook\Website

27. Have you visited this Wyoming website?

- 1. Yes
- 0. No

The following questions are for classification purposes only, and will help us understand different groups of people.

D1. Are you...?

- ☐ Married
- ☐ Divorced/separated
- ☐ Widowed
- ☐ Single/never married

D2. Including you, how many people are currently living in your household? \_\_\_\_ (IF D2=1, GO TO D4)

D3. How many living in your household are children younger than age 18? \_\_\_\_

D4. Which of the following categories best represents the last grade of school you completed?

- ☐ High school or less
- ☐ Some college/technical school
- ☐ College graduate
- ☐ Post-graduate degree

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D5. Which of the following categories best represents the total annual income for your household before taxes?

- ☐ Less than \$35,000
- ☐ \$35,000 but less than \$50,000
- ☐ \$50,000 but less than \$75,000
- ☐ \$75,000 but less than \$100,000
- ☐ \$100,000 but less than \$150,000
- ☐ \$150,000 or more

D6. Which of the following best describes your racial and ethnic heritage? Are you...? (ALLOW MULTI)

- ☐ Caucasian/white
- ☐ African-American/black
- ☐ Latino/Hispanic
- ☐ Asian
- ☐ American Indian
- ☐ Other (Specify \_\_\_\_\_)

D7. Are you...?

- ☐ Male
- ☐ Female

D8. What is your age? \_\_\_\_\_

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